

Message Text

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SUBJECT: GLOBAL MARKET RESEARCH: PRODUCTION MACHINERY,
TEST INSTRUMENTATION & SPECIAL MATERIALS FOR ELECTRONIC
COMPONENTS; & ELECTRONIC COMPONENTS - NETHERLANDS

REF: USDOC 4816

1. TML'S RESPONSES TO QUERIES RAISED ARE AS FOLLOWS
AND RELATE TO PARA NUMBERS IN REFTEL:

PARA 1 - TML NOTES COMMENTS.

PARA 2 - TERMINOLOGY USED IN END-USER CATEGORY A
ADMITTEDLY NOT VERY REVEALING: IT MEANS CATHODE RAY
TUBES, ELECTRON AND TRANSMITTING ELECTRON TUBES.

PARA 3 - QUESTION GARBLED IN TRANSMISSION, BUT PRESUM-
ABLY REQUESTS SEGREGATION OF PRODUCTION MACHINERY FROM
PRODUCTION TOOLS. IN ORDER TO EFFECT THIS, TML HAVE
PREPARED ADDITIONAL PAGE 10A, AND AMENDED PAGES 16 &
27; SEVERAL COPIES THESE PAGES BEING AIRMAILED USDOC
AND THE HAGUE APRIL 10.

PARA 4 - TML CONFIRMS THAT SPECIAL MATERIALS REFERRED
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TO THROUGHOUT REPORT ARE ONLY PRODUCTS LISTED IN SPEC
ATTACHMENTS, AND USED FOR PRODUCTION COMPONENTS.

PARA 5 - CATEGORY E COVERS ELECTRONIC EQUIPMENT USED
EXCLUSIVELY BY INDUSTRY AND REFERS TO ITEMS SUCH AS
AUTOMATED PRODUCTION AND PROCESS CONTROL, INDUSTRIAL
TESTING AND QUALITY-CONTROL, NUMERIC CONTROL SUPPORT

AND DRIVING EQUIPMENTS, AND PAGING SVSTEMS. FINAL SECTION ON PAGE 66 WILL BE FOUND TO INCLUDE PRODUCTS E # F OF PAGE 56, SECTION 1. IN PART THREE OF REPORT, PAGES 102 THRU 104 "INDUSTRIAL CONTROL EQPT." REFER.

PARA 6 - AFTER MANY READINGS, TML FINDS THIS QUESTION OBSCURE AND IT APPEARS TO BEAR NO RELATION TO DATA GIVEN ON PAGE 56. CLARIFICATION REQUESTED.

PARA 7 - DISCREPANCIES IN TWO CITED FIGURES ARE TO BE EXPLAINED (AS IS SO MUCH IN THIS MARKET WHICH IS AT THE MERCY OF PHILIPS' DOMINANCE) BY PHILIPS PHILOSOPHY OF PROVIDING ONLY PARTIAL TRADING RETURNS TO THE OFFICIAL STATISTICAL OFFICE - A PRACTICE FREELY ADMITTED BY THEM TO BE SUPPRESSED TRUTH, BUT BY MOST OTHERS HELD TO BE FREQUENTLY DISTORTED TRUTH. IN CONSEQUENCE, PRODUCTION FIGURES OF COMPONENTS ARE EVERYWHERE AT VARIANCE, SOME-TIMES BY UP TO 40 PERCENT. THE HIGHLY DIVERSIFIED STRUCTURE OF THE PHILIPS GIANT, OFTEN UNDER OTHER GUISES IN ONE DEGREE OR ANOTHER OF CAPTIVE OR CONTRACTED MANUFACTURING, COUPLED WITH FREE MOVEMENT OF PART-COMPONENTS ACROSS NATIONAL FRONTIERS INTO BELGIUM, UK AND ELSEWHERE, AND OFTEN BACK AGAIN, MAKES THIS CONFUSION CONFOUNDED. PAGE 57 IS THE PRODUCT OF AN AMALGAM OF GENUINELY-HELD TRADE OPINIONS, INCLUDING SOME PHILIPS SOURCES, WHILST PRODUCTION SECTION OF PAGE UNCLASSIFIED

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61 IS MORE RELIANT UPON THE OFFICIAL CBS AS A DATA-SOURCE. TML SUGGESTS STEPS BE TAKEN TO CORROBORATE ITS COMMENTS ON THIS SCORE WITH COMMERCIAL OFFICERS IN AMSTERDAM, THE HAGUE AND BRUSSELS, TO ALL OF WHOM, ACCORDING TO TML, KNOW THE PROBLEM ONLY TOO WELL.

PARA 8 - BREAKDOWN OF TABLE 4A ON PAGE 61 IS PROVIDED BY ISSUE OF NEW PAGES 61 AND 61A, BEING AIRMAILED USDOC AND THE HAGUE APRIL 10.

PARA 9 - MANUFACTURERS ON PAGES 74 & 75 ARE MIXTURE OF COMPONENT MAKERS ONLY AND MAKERS OF END-PRODUCTS PLUS COMPONENTS (EG PHILIPS, SAIT, DIODE AND TEXIM).
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